DOCUMENT RESUME

ED 143 144 95 EA 009 882

TITLE	Educational Needs Assessment: Theme and Variations. Abstracts of Models Presented (Oakland, California, April 7-9, 1976).
INSTITUTION	Alameda County School Dept., Hayward, Calif.; International Society for Educational Planners, Mankato, Minn.
SPONS AGENCY	National Inst. of Education (DHEW), Washington, D.C.
PUB DATE	Apr 76
NOTE	53p.; Not available in hard copy due to light print of original
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	Abstracts; Community Colleges; Elementary Secondary Education; Junior Colleges; *Models; *Needs Assessment; *Program Descriptions

ABSTRACT

This document presents abstracts describing 25 needs assessment projects appropriate for a variety of educational levels. The abstracts provide an overview of each model as well as information on the developer, source, cost, copyright, procedures for use, implementation needs, and special features. (IRT)

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ED143144

Educational Needs Assessment:
Theme and Variations

ABSTRACTS
OF
MODELS PRESENTED

Oakland Hyatt House
April 7-9, 1976

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EA 009 882

Alameda County School Department

International Society of Educational Planners

National Institute of Education

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Printed by Alameda County School Department

Rock La Fleche ● Superintendent

ALAMEDA COUNTY NEEDS ASSESSMENT MODEL (ACNAM)

Second Experimental Edition

DEVELOPER:	SOURCE:	COST:
Belle Ruth Witkin Editor	Alameda County Education Ctr. 685 A Street Hayward, California 94541 415/881-6281	Sample Kit - $6.50
		COPYRIGHT: 1975

OVERVIEW:

The ACNAM was designed to assist schools in California to assess needs for planning programs funded under a consolidated application for ESEA Title I and other federal and State funds. However, the model can be used for program planning in any elementary school (K-6).

1. ACNAM assesses needs in nine basic components of the school program: language development, reading, mathematics, multicultural education, bilingual/bicultural education, staff development, parent participation, parent education, and health/auxiliary services as well as the affective and psychomotor domains. Data are gathered based on 33 goals averaging three for each area.
2. Data collection instruments: The survey questions produced observational and behavioral data on learners' attitudes, skills, and knowledge, in relation to the goals. Similar data are gathered for teachers and parents. The data yield numerical indexes of criticality of need. There are two types of preprinted surveys:
   a. One Goal Rating Survey for teachers and parents. Each of the 33 goals is given a subjective rating of importance on a 5-point scale.
   b. Five attainment surveys: Teacher, pupil, parent, advisory committees, and staff development. The parent and advisory committee surveys are available in English and Spanish. The pupil surveys are in two versions--for readers and for nonreaders.

   Statistical Summary and Data Forms are provided to collect and display other data, such as test scores, demographic data, and health data.
3. Data processing services are available through the Hayward Unified School District Data Processing Center in Hayward, California, for the school year 1975-76.

   A User's Manual, Teacher Manual and Script for the Pupil-nonreader version, and a Data Analysis Guide are also provided.

PROCEDURES:

1. Determine sampling bases for each survey.
2. Administer all surveys.
3. Process data. Hayward Unified School District Data Processing Center services may be used for this stage.
4. Aggregate and combine all information from ACNAM, test and demographic data, and other sources.
5. Analyze, interpret, and enter data on program application or apply to school plan.

IMPLEMENTATION NEEDS:

Coordinator

1 survey booklet for each respondent to be surveyed. Booklets are reusable.
1 optical scan answer sheet for each respondent.
1 Goal Rating Survey for each staff member, teacher or parent surveyed.

The Administrator's Checklist in the User's Manual gives an outline of the necessary steps for implementation. These can be done by someone delegated by the site administrator.

Each survey takes about 1 hour to complete. Time for complete administration may be between 2 and 4 weeks. Data processing will take a maximum of 4 weeks.

SPECIAL FEATURES:

1. User's Manual provides practical procedures to assist in success of needs assessment.
2. Easily administered by site personnel.
3. Preprinted surveys.
4. Low-cost data processing services.
5. Data Analysis Guide to assist in interpreting and using data when writing school program. Includes sample forms for data displays and for comparing goal rating with criticality data.

PRESENTED BY:

Keith Shattuck, Norwalk-LaMirada Unified, Norwalk, California

Marie Plakos, Norwalk-LaMirada Unified, Norwalk, California

A COMPREHENSIVE ASSESSMENT OF MINIMAL LEARNER OBJECTIVES FOR SUCCESSFUL COPING IN THE SOCIETY OF 1985

DEVELOPER:	SOURCE:	COST:
Ray L. Sweigert, Jr.	Atlanta Assessment Project Instructional Services Center 2930 Forrest Hill Dr., SW Atlanta, GA 30315	
		COPYRIGHT: Property of the Atlanta Board of Education

OVERVIEW:

Now completing its fourth year, the Atlanta Assessment Project was designed to answer three questions:

1. What will young people in the Atlanta area need to know, be able to do, and value—to the extent possible to determine—in order to be able to cope with life in the society of 1985?
2. Where are young people in the Atlanta of today in achieving these things?
3. To what extent are the assessment instruments and techniques developed to answer the first two questions applicable to statewide testing in Georgia?

The Project is funded under Title III of the Elementary and Secondary Education Act as administered by the Georgia Department of Education and operates within the Atlanta Public Schools.

PROCEDURES:

To answer the three questions stated above, the Project used as a starting point the Goals for Education in Georgia, adopted by the Georgia Board of Education in 1970 and developed to reflect learner needs for living in 1985. The goals were derived initially from position papers, written by scholars and experts, on future conditions in Georgia regarding 19 areas of concern. Using these goals, the Project (1) conducted a series of Delphi studies to validate the goals, involving nearly 1,100 community leaders, educators, and high school students; (2) developed specific objectives to clarify and define each goal, involving the participation of over 90 teachers,

curriculum specialists, college and university professors, professional staff of the State Department of Education, and representatives of various social agencies in writing, reviewing, and revising the objectives; (3) developed tests and testing procedures to measure achievement of the objectives by contracting with a test development agency through competitive bidding at the national level; (4) administered the tests to over 3,000 twelfth graders in the Atlanta Public Schools in a field tryout; (5) conducted item analyses and revised test items as necessary; (6) conducted a statewide survey of test items to determine the appropriateness of each one for use in a statewide assessment; and (7) is currently conducting a statewide field tryout of the test instruments, involving nearly 15,000 twelfth-grade students in 65 school systems throughout Georgia.

IMPLEMENTATION NEEDS:

The test instruments are presently unavailable for use outside the State of Georgia. However, it is anticipated that when current field tryouts have been completed and necessary adjustments have been made, the instruments will be made available to interested educational agencies anywhere.

It will be possible for a school system or a state agency to conduct a survey to determine the relative importance of each of the goal statements for that clientele and then to make a selection of the goals or goal areas in respect to which the agency would like to conduct its assessment. It will be possible to use test instruments as they are or to reformat some test exercises to measure only those goals and objectives selected.

PRESENTED BY:

Ray L. Sweigert, Jr., Director
Atlanta Assessment Project
Atlanta, Georgia

SPECIAL FEATURES:

- —Based on a set of 120 goals organized into 14 areas.
- —Goals written to reflect the needs of the individual in 1985.
- —Goal statements validated through Delphi technique.
- —Objectives written to represent goals at a minimal level of achievement necessary for successful coping, based on collective judgment of writers and reviewers.
- —Test exercises written to measure specific objectives.
- —Test exercises reviewed for content validity, structural soundness, and sixth-grade reading level.
- —Total of about 3,500 test items, contained in 94 test forms, measuring over 600 objectives in 14 goal areas.
- —At least five test items for almost every objective.
- —Test exercises may be used at different grade levels.
- —Results reported in terms of average percentage of students answering correctly across items, by objective and goal, and in terms of the percentage of students achieving mastery of given objectives (adjustable criterion level).

BATTELLE SURVEY OF EDUCATIONAL NEEDS
FOR
ELEMENTARY AND SECONDARY SCHOOL SYSTEMS

DEVELOPER:	SOURCE:	COST:
David L. Hamilton	Center for Improved Education Battelle Memorial Institute 505 King Avenue Columbus, Ohio 43201	Negotiated according to type of service requested.
		COPYRIGHT: 1972

OVERVIEW:

Battelle's Survey assesses perceptions of the broad educational community in terms of (1) the way services and programs are currently operating, and (2) the way these services and programs should operate in the future.

The survey is designed to gather perceptual data in a systematic way from Board Members, Administrators, teachers, students, parents and community members at large within a 95% confidence level. Data is analyzed and reported back by numerical rank ordering of each item as it is perceived by the various groups, i.e., parents, teachers, students, etc. In addition, the data may be classified under function clusters. Sixteen function clusters are utilized: (1) Personal Development of the Student, (2) Educational Program, (3) Individualizing Instruction, (4) Instructional Management (5) Guidance and Counseling, (6) Managing Auxiliary Programs, (7) Formulating Policy, (8) Planning, (9) Innovating, (10) Communicating, (11) Supervising, (12) Solving Problems, (13) Staff Development and Board Orientation, (14) Managing Facilities and Resources, (15) Budgeting, and (16) Evaluating.

In summary, the Battelle Needs Assessment Service provides a school district with a systematic method for identifying and documenting needs for assigning priorities, and for compiling information in a form which can be understood and utilized by both educators and laymen for district-wide planning.

PROCEDURES:

1. CIE (Center for Improved Education) would provide printed survey forms for the various sample groups in quantity to establish a 95% confidence level in generalizing the results back to the school district at large.
2. A representative of CIE would come to your local district to assist a locally designated coordinator by providing detailed instructions on how to obtain the random samples and administer the survey.
3. The district would administer the survey and return the completed forms to the CIE.
4. CIE would code the data into machine-readable form and statistically analyze the data via our computer.

5. The CIE staff personnel would analyze the open-ended comments and correlate them into the printed report.
6. A representative of the CIE would return to your district and provide an agreed-to specified number of copies of the statistical report. At that time the CIE staff member would provide an explanation of how to interpret and utilize the data for local analysis.

IMPLEMENTATION NEEDS:

A project director (a local educator) with some clerical assistance and approximately 30 volunteers to assist in distributing and picking up completed forms from community residences. It is estimated that the survey can be administered within a 2-week time frame. An additional 3 to 4 weeks are necessary to analyze the data and produce reports. Time necessary to complete the assessment is usually 6 to 8 weeks from start to point of having a produced report, however, this time frame is contingent upon local conditions and effort.

SPECIAL FEATURES:

Characteristics of the Battelle Survey of Educational Needs are:

- The survey is based on a number of specifically stated goals and/or conditions.
- Individually designed surveys exist for these groups: students, teachers, parents/community at-large, Administrators and Board Members.
- Randomly selected respondents give their opinion on the extent the stated goal or condition actually exists and on the extent the goal or condition should exist. The difference stated numerically, represents the "need."
- Analysis procedures provide a rank ordering and expansion of needs perceived by each group of respondents.

PRESENTED BY:

Thomas Gripp, Coast Community College District, Costa Mesa, California

BATTELLE SURVEY OF EDUCATIONAL NEEDS
FOR
COMMUNITY AND JUNIOR COLLEGES

DEVELOPER:	SOURCE:	COST:
David L. Hamilton	Center for Improved Education Battelle Memorial Institute 505 King Avenue Columbus, Ohio 43201	Negotiated according to type of service requested.
		COPYRIGHT: 1973

OVERVIEW:

Battelle's Survey assesses perceptions of the broad educational community in terms of (1) the way services and programs are currently operating, and (2) the way these services and programs should operate in the future.

The survey is designed to gather perceptual data in a systematic way from Board of Directors, students, faculty, administrators, supportive staff, and interested other publics who have a stake in or exert influence over the organization. Data is analyzed and reported back by numerical rank ordering of each item as it is perceived by the various groups, i.e., parents, teachers, students, etc. In addition, the data may be classified under function clusters. Twelve function clusters are utilized: (1) Communicating, (2) Community Services, (3) Evaluating, (4) Goals, (5) Guidance, (6) Instruction, (7) Managing Personnel Relations, (8) Managing Resources and Materials, (9) Participative Decision-Making, (10) Planning, (11) Staff Development, and (12) Student Services.

In summary, the Battelle Needs Assessment Service provides a community college with a systematic method for identifying and documenting needs for assigning priorities, and for compiling information in a form which can be understood and utilized by both educators and laymen for district-wide planning.

PROCEDURES:

1. CIE (Center for Improved Education) would provide printed survey forms for the various sample groups in quantity to establish a 95% confidence level in generalizing the results back to the community college at large. In the instance of multiple campus operations, we would additionally supply forms to generalize back to each campus as well as district-wide.
2. A representative of CIE would come to your college to assist a locally designated coordinator by providing detailed instructions on how to obtain the random samples and administer the survey.

3. The college would administer the survey and return the completed forms to the CIE.
4. CIE would code the data into machine-readable form and statistically analyze the data via our computer.
5. The CIE staff personnel would analyze the open-ended comments and correlate them into the printed report.
6. A representative of the CIE would return to your college and provide an agreed-to specified number of copies of the statistical report. At that time the CIE staff member would provide an explanation of how to interpret and utilize the data for local analysis.

IMPLEMENATION NEEDS:

A project director (a local educator) with some clerical assistance and approximately 30 volunteers to assist in distributing and picking up completed forms from community residences. It is estimated that the survey can be administered within a 2-week time frame. An additional 3 to 4 weeks are necessary to analyze the data and produce reports. Time necessary to complete the assessment is usually 6 to 8 weeks from start to point of having a produced report, however, this time frame is contingent upon local conditions and effort.

SPECIAL FEATURES:

Characteristics of the Battelle Survey of Educational Needs are:

- The survey is based on a number of specifically stated goals and/or conditions.
- Individually designed surveys are made for these groups: students, faculty, supportive staff, administrators, and board members.
- The respondents give their opinion on the extent the goal or condition should exist. The difference represents the "need."
- Analysis procedures provide a rank-ordering and comparison of needs perceived by each group of respondents.

PRESENTED BY:

Thomas Gripp, Coast Community College District, Costa Mesa, California

CALIFORNIA SCHOOL BOARDS ASSOCIATION

DEVELOPER:

California State Department of Education
California School Boards Association

SOURCE:

Office of Information Dissemination
California State Dept of Ed
721 Capitol Mall
Sacramento, Ca. 95814

COST:

NA

COPYRIGHT:

California State Dept of Ed -- 1975

OVERVIEW:

The purpose of the survey was to review information regarding the conditions within the total community of California's public school system in order to more correctly allocate the states fiscal resources. The survey attempts to develop a workable picture of what schools look like now and clear images as to what they ought to look like both now as well as in the near future. In this respect, the survey had a three pronged focus: 1) Assessment of the public schools in California; 2) Major problems confronting California public schools; 3) Changing the educational system.

The information surfaced by the survey was enough to help the California State Department of Education in developing its annual budget. The analysis of the data by the department isolated critical educational needs which were translated into priorities and concerns. Priorities were the basis for budgetary considerations whereas the concerns were more readily treated through review of existing management practices.

PROCEDURES:

The needs assessment survey was addressed to the complete school--community of 200 school districts randomly selected from the state's total of 1100 school districts.

The sample population of the districts, except for the county offices of education, was stratified using standardized departmental criteria: 1) District reorganization; 2) Family income; 3) District enrollment; 4) District poverty index; 5) Percentage of district minority enrollment; 6) District's expenditures per unit of average daily attendance and 7) Class size.

CALIFORNIA SCHOOL BOARDS ASSOCIATION

PROCEDURES: (Cont'd)

All 58 county level education systems were included in the survey.

The survey was designed to gather opinions from the total school--community, i.e., parents, students (grades 11 and 12), principals, teachers, superintendents, and board members.

IMPLEMENTATION NEEDS:

a) Methodology to select and identify the sample population of school districts.

b) Expressed willingness of the selected districts to participate in the survey.

c) Development of an instrument which will surface the kinds of information desired.

d) Production of the questionnaires and related instrument sheets.

e) Methodology to aggregate the responses into manageable format for analysis.

SPECIAL FEATURES:

The survey was cooperatively developed by the California State Department of Education and the California School Boards Association.

PRESENTED BY:

James C. Talley, California School Boards Association
Sacramento, California
(formerly with the California State Department of Education)

CSE/ELEMENTARY SCHOOL EVALUATION KIT:

NEEDS ASSESSMENT

DEVELOPER:	SOURCE:	COST:
R. Hoeffner, P. Bradley, S. Klein, M. Alkin at the Center for the Study of Evaluation, UCLA	Allyn and Bacon, Inc. 470 Atlantic Avenue Boston, Massachusetts 02210	$100.00
		COPYRIGHT: 1972

OVERVIEW:

Designed especially for the elementary school principal or elementary district administrator, the CSE assessment kit includes a set of comprehensive procedures and materials needed to gather information about students needs. The four major steps of the program are: 1) identifying goals for specific grade levels; 2) selecting tests to measure attainment in these areas; 3) administering appropriate tests; and 4) selecting those goals of prime concern. Requiring no specialized skills, the program features a wealth of well-researched information in practical and useable form. Participants (faculty, parents, board members and community members) study and rank a list of 106 educational goals. Options exist in choosing participants, in using mailed questionnaires or working with groups, and in deciding on critical areas.

A complete set of test reviews, organized by grade level and goal areas, makes selecting appropriate tests a relatively simple matter. The final section of the kit presents a unique method by which the principal can select those goal areas of priority value. Sample calendars, public relations form letters, questionnaires, and other material provide the principal with handy references.

This kit enables a district to answer these questions:

- What are the goals of a school?
- How well are students achieving in the goal areas?
- How can this information be analyzed and communicated to the community?
- Which goal areas, if emphasized, are most likely to improve?

PROCEDURES:

1. Principal decides grade level(s) for which goals will be selected.
2. Principal identifies groups to be represented. Suggested sampling methods are included. The principal has the option of not including other viewpoints.
3. A method for collecting information is decided--in groups, individually (mailed questionnaires), or by a combination of both.
4. Using a list of 106 goals and any others identified, participants rate each on a five-point scale (most important to unimportant).
5. Principal, using simple mathematical procedures, tallies, averages, and ranks goals for each group.

6. An interim report is compiled and distributed to participants.
7. Professional staff, working through the kits, select appropriate tests for goal areas.
8. Tests are administered and results interpreted. Sampling procedures and information for interpreting results are included.
9. Principal, using guidelines recommended, identifies goal areas of greatest priority.
10. Results of study are communicated in a report to the community.

IMPLEMENTATION NEEDS:

Due to the nature of the kit, the elementary school principal or administrator, with some clerical and staff assistance, can manage the project. The time factor will vary. The goal-setting stage, depending upon the groups used in the study, can be completed in twelve weeks. Test selection, administration and summarization of results will take longer. Costs for this program are minimal with most materials supplied.

SPECIAL FEATURES:

The CSE assessment kit contains:

... a complete program for needs assessment of student goals.
... carefully documented and researched information.
... many options.
... practical; clearly described; well-organized materials. Additionally, no special training is necessary.

PRESENTED BY:

Adrianne Bank, University of California, Center for the Study of Evaluation, Los Angeles, California

Chuck Weiss, Educational Systems, Los Angeles, California

THE NEW CSE NEEDS ASSESSMENT KIT

DEVELOPER:	SOURCE:	COST:
A. Bank, D. Elvenstar, M. Bastone	Center for the Study of Evaluation 145 Moore Hall UCLA Graduate School of Education Los Angeles, California 90024	N/A
		COPYRIGHT: Developmental

OVERVIEW:

The new CSE Needs Assessment Kit currently under development will be a revised and expanded version of the CSE Elementary School Evaluation Kit: Needs Assessment, published by Allyn and Bacon, 1972. It will incorporate many of the desirable features of the earlier kit while simplifying some of the procedures and adding new options. The revised kit will contain guidelines and resources that make it appropriate for use by educators on both the elementary and secondary levels. Additionally it can be adapted for classroom, school or district application.

As defined in the kit, needs assessment is a systematic technique for deciding on high priority goal areas in which to plan programs. It consists of three stages: (1) identifying goal preferences; (2) obtaining base-line data about the status of these goals in terms of student performance as well as resources available; and (3) screening the information from the earlier two stages to decide on high priority goal areas. Within each stage, several alternative procedures are provided along with suggestions for deciding among them.

For stage 1, the kit will provide procedures and materials for, (a) choosing from among given goal statements, or (b) generating goal statements by means of either a futures technique, a Delphi technique, a values clarification technique, or a problems survey technique.

For stage 2, the kit, as before, will provide a catalog of standardized tests organized by grade level and goal area. In addition, it will provide other suggestions for measuring achievement, attitude and for documenting present activities and resources.

For stage 3, the kit will provide explanations of alternative weighting procedures which relate the information gathered in stage 1 to the information gathered in stage 2.

The kit will be formatted so that procedures can be used independently or in sequence depending on the purposes of the user. The kit will enable users to answer the following questions: (1) What do we want most from our district/school/class? (2) What are we doing now in terms of these preferences? (3) Where shall we direct our efforts in the future?

PROCEDURES:

1. The Needs Assessor (e.g. principal, department chairman, teacher) identifies groups to be represented and selects participants. Alternative sampling methods are included.
2. Needs Assessor decides on the preferencing technique to be used--goal selection, futures workshop, Delphi survey, values clarification workshop, problems survey.
3. Participants identify goal preferences.
4. Needs Assessor decides on method(s) of base-line data collection--standardized tests, other tests, resource survey.
5. Needs Assessor collects and summarizes data.
6. Needs Assessor guides participants in relating preference information to current status information.
7. Needs Assessor and participants identify high-priority goals towards which program-planning efforts will be directed.
8. Needs Assessor reports on the needs assessment process and its results to participants, school, community, etc.

IMPLEMENTATION NEEDS:

Due to the specific nature of the kit the Needs Assessor with some clerical and staff assistance can manage the project. The time factor will vary from situation to situation. Depending upon the method used, Stage 1 can be completed either by meeting or by mail over the course of several weeks. Base line data collection can be completed quickly or may take a considerable amount of time depending on the discretion of the Needs Assessor. The final determination of priority areas can be handled quickly. Costs for conducting Needs Assessment procedure are minimal, involving only the duplication in quantity of materials supplied in the kit.

SPECIAL FEATURES:

The new CSE Needs Assessment Kit contains:

1. Alternative needs assessment procedures suitable for the elementary and secondary levels, and for class, school or district use.
2. Field-tested and reviewed procedures.
3. Practical and easy to use guidelines with examples.
4. Complete instructions: no special training necessary.

PRESENTED BY:

Adrianne Bank, Center for the Study of Evaluation, University of California, Los Angeles, California

COLORADO ADULT NEEDS ASSESSMENT STUDY

DEVELOPER:	SOURCE:	COST:
Bruce M. Barlow Carmen R. Timiraos	Colorado Department of Education Adult Education State Office Building Colfax and Sherman Streets Denver, Colorado 80203	Figures not available at this time.
		COPYRIGHT: N/A

OVERVIEW:

Designed to conduct large scale needs assessment of adults, business and industry, and agencies that serve adults. It gathers data on participants' knowledge, perceptions and expectations of existing programs. It includes an interviewer training design.

This study identifies the population by sex, age, race, educational, and income level as well as their employment, marital and military status. It identifies the employers by size, educational and training requirements, and the agencies by size of area served, type of client (by sex, race, age, and income) and services provided.

Documents include:

1. Statewide Technical Report
2. Statewide Summary Report
3. General Information Brochure
4. Statewide Computer Print Outs including:
   a. citizen survey
   b. employer survey
   c. agency survey
5. 13 Planning and Management Computer Print Outs (citizens only)

Available at cost through Dr. Walter Turner, Northern Colorado BOCES, 832 South Lincoln, Longmont, Colorado 80501.

PROCEDURES:

1. Identify area to be sampled.
2. Determine sample size.
3. Train interviewers.
4. Develop mail-out process for agency, and business and industry questionnarie.
5. Conduct surveys.
6. Interpret results.
7. Final report.

IMPLEMENTATION NEEDS:

Depending on the size of the sample, one interviewer per one hundred households over a three-month period. Equal amount of time needed for mail-out surveys.

An administrator, clerical assistance to handle correspondence and coding of instruments, an analyst, and a writer, are needed to handle the project. Cost of materials is minimal since original documents are available for reproduction. Collecting the data is expensive.

Time needed: minimum one year for entire process.

SPECIAL FEATURES:

Materials needed:

1. citizen questionnaire
2. employer questionnaire
3. agency questionnaire
4. interviewer training manual
5. sampling procedure

Training interviewers is strongly recommended.

PRESENTED BY:

Carmen Timaraos, Colorado State Department of Education, Denver, Colorado

DALLAS' MODEL FOR SHARED DECISION MAKING

DEVELOPER:	SOURCE:	COST:
Dallas Independent School District	Dallas Independent School District 3700 Ross Avenue Dallas, Texas 75204	Contact Source
		COPYRIGHT: No (1973)

OVERVIEW: Based on the premise that the decision-making process is as important as the decision itself, the Dallas model provides a framework for involving all members of the educational community in decisions. This model is a case study showing how this approach was developed and used in the Dallas school system.

The goals involved were initially developed by the board. In order to effectively implement these goals, a program entitled "Operation Involvement" was set up. This was a systematic effort to get assistance from the educational community in determining program goals, assessing needs, and establishing priorities and budgeting resources.

Groups participating in Operation Involvement are:

1. The District Communications Committee is composed of representatives from all employee groups and as such, concerns itself with matters of importance to any of these groups.
2. The Dallas School Administrators' Association has a full-time president whose duty is to facilitate communications among all administrators and the superintendent.
3. The Superintendent's Student Advisory Committee which is composed of junior and senior class members from each of the district's high schools.
4. A PTA Council consisting of representatives from each school within the district.
5. Two sub-groups are: the Principals' Advisory, composed of elected principals; and the Field Advisory Team, composed of administrators from all operational levels.

Detailed information is included explaining how to set up such representative committees.

Each group reviews annually the set of original goals identified at the beginning of the process and identifies new goals. Rank-ordering follows. The operation Involvement Project committee plays the major role in establishing goals, priorities, and relating these to district budget allocations.

PROCEDURES:

Because of the nature of the case study, one general set of operating procedures for all groups is not applicable. What follows are five major phases of operation for the Operation Involvement Project committee.

1. The committee meets at the beginning of each school year to set goals and discuss priorities for the following year. Recommendations come from all sub-groups in the form of "concerns."
2. On a retreat, selected representatives review goals and budget projections and assign priorities. Representatives attend a board retreat to communicate and

discuss this information.
3. Representatives visit local schools to study areas of concern by meeting with school area personnel.
4. Representatives study costs of goal items and start identifying priorities based on budget projections.
5. Representatives recommend to the board a set of continuing goals and a set of new goals, priorities, and budget.

IMPLEMENTATION NEEDS:

The decision-making process is on-going and involves every employee group in the district, along with community representatives and students throughout each school year. Each committee functions on a continuous basis.

SPECIAL FEATURES:

PRESENTED BY:

Gerald King, Dallas Independent School District, Dallas, Texas

DEVELOPER:

Dallas Independent School District

SOURCE:

Dallas Independent School District
3700 Ross Avenue
Dallas, Texas 75204

COST:

Contact Source

COPYRIGHT:

No (1974)

OVERVIEW: The mission of the SWEP project was to examine, conceptualize, and describe the secondary school in the years 1980-2000.

The task was difficult. In addition to the lack of agreement on the role of education, it was necessary to deal with the uncertainties involved in making predictions about the future. The task, as we viewed it, had to begin with a comprehensive description of the Society of the 1980's with special emphasis on how education would be impacted by that future society. The future society, for example, will have certain needs that the educational process must meet: certain skills in workers, certain citizen attitudes, certain traditions, knowledge, and values transmitted from the past, and the like. The total universe of educational influences must provide for meeting these needs, but the schools are only one sector of that universe. What will be the bounds of the school sector, and what other institutions of society will fill the needs not met by the schools?

Given some decision on the extent of the school sector, the project attempted to define the societal needs to be met by the schools--the secondary schools in particular--and sought to describe the programs to meet those needs. From these program specifications came descriptions of staff, student population, and facilities.

PROCEDURES:

The SWEP project utilized a modified DELPHI technique. Two survey instruments were developed: one to assess the future events that would confront the high school graduate in the decade of the 1980's and beyond. The other to determine the high priority educational goals for the decade of the 1980's. The product of the study was a future oriented needs assessment report presented to educational decision-makers in the two-county area comprising the Dallas/Ft. Worth Metroplex.

SKYLINE WEST EDUCATION PLAN

IMPLEMENTATION NEEDS:

The reports generated by the SWEP project were not intended to be blueprints for a specific school to be built in the future; rather, they were to provide input to educational decision-makers regarding program decisions that would be implemented in the 1980's. It is hoped that any decision that has long-range consequences will utilize the information provided in the SWEP project reports so that the uncertainty of any given decision will be minimized.

SPECIAL FEATURES:

The SWEP project is a future-oriented needs assessment which purposely ignored the decade of the 1970's and concentrated on the last two decades of the 20th century.

The SWEP project attempted to minimize the risks enumerated by Alvin Hoffler in his statement, "All education springs from some image of the future. If the image of the future held by a society is grossly inaccurate, its education system will betray its youth"

PRESENTED BY:

Gerald King, Dallas Independent School District, Dallas, Texas

A FAULT TREE APPROACH TO NEEDS ASSESSMENT

DEVELOPER:

Kent G. Stephens

Belle Ruth Witkin
(qualitative analysis only)

SOURCE:

Brigham Young University
130 McKay Building
Provo, Utah

(Materials available according to specific needs and circumstances.)

COST:

Varies according to needs.

COPYRIGHT:

N/A

OVERVIEW:

Fault Tree Analysis (FTA) is a method for analyzing and predicting the most probable modes of failure of a system in order to redesign or monitor the system to increase the likelihood of success. FTA provides guidelines as to what should not be done as an added dimension to the traditional approach of pursuing what should be done in needs assessment. It is process rather than product-oriented. For needs assessment FTA may be used alone or combined with methods of goal setting to derive high priorities of need on a logical basis.

Two kinds of analysis are made--qualitative and quantitative. The qualitative analysis is accomplished through the development of a logic tree, consisting of a series of events formulated in a step-by-step process, related to a principal "undesired event". The quantitative analysis, for which a computer program is available, combines markov processes, matrix and Boolean algebra, logic, and Bayesian probability. The completed tree is drafted by computer and a "strategic path" is traced out, showing the chains of events in the order of their criticality.

Small groups interact to generate the inputs. They can be trained in a day or two, and large trees of several hundred events can be developed in stages over one or two weeks. It is not necessary for participants to understand the theory or the mathematics of the process in order to use FTA.

This presentation will focus on an approach to administration and organizational behavior related to a holistic view of needs assessment. Special applications of the technique to career education, bilingual education, and adult education will be discussed.

PROCEDURES:

1. Technological orientation
2. Qualitative fault tree development
3. Quantitative fault tree development
4. Data display
5. Development of offsetting strategies to potential failure sequences in needs assessment.

A FAULT TREE APPROACH TO NEEDS ASSESSMENT

IMPLEMENTATION NEEDS:

Local Coordinator

Participants who know the various parts of the system--e.g., teachers, administrators, parents, students, school board members, counselors.

Two-hour orientation session of participants

FTA consultant. Training programs are available.

Time and costs will depend on the size and type of the system to be analyzed, and the depth of analysis desired. In some instances computer may be employed.

SPECIAL FEATURES:

FTA may be used to derive high priority needs for any kind of system and at any level--local, intermediate, state, higher education, regional, national.

Illuminates relationships of needs in a system that previously may have been viewed as unrelated.

FTA can show the interrelationship and ordering of several hundred events.

Leads to and highlights cause and effect relationships in critical need areas. More specific needs are used to generalize to greater needs.

PRESENTED BY:

Kent Stephens, Brigham Young University, Provo, Utah

Gil Martinez, California State Department of Education

Don Grimes, California State Department of Education

George Puckett, Nebo School District, Spanish Fork, Utah

NEEDS ASSESSMENT PROJECT FOR THE CENTRAL FLORIDA COMMUNITY COLLEGES CONSORTIUM

Florida C. C.

DEVELOPER:	SOURCE:	COST:
Katie Duncan Tucker	2722 Pontiac Drive Tallahassee, Florida 32301	$1500 to $4500 Dependent Upon State
		COPYRIGHT: July, 1972

OVERVIEW:

Needs Assessment is designed for everyone who is denied fulfillment of his potential by providing ammunition to influence planners, administrators, boards, teachers, et al, to examine their attitudes in light of "effective" education service. For too long, the needs being met by most community colleges, and the educational system in general, have been those needs vociferously expressed by a selective, middle-class group of active citizens in the community. Therefore, educators rarely are aware of the educational needs of all citizens - especially those citizens who lack a truly effective voice in the educational process. Education must create a method to evaluate what the needs are, which needs are most important, and how they can be best met. To be effective, the educational system must have a dependable method for recognizing the changing patterns and needs of the community so that workable plans can be implemented. A Needs Assessment would provide a method leading to more effective programs enhancing the ability to offer the community more realistic opportunities.

Consequently, the two-fold purpose of the Needs Assessment Project is: To generate valid data on economic, social, and cultural deficiencies in the community that education can remedy; and then, integrate these findings into a college planning process which can energize a total college to meet those diverse educational needs of all individuals that can be served.

Broadly, the objectives of this project are: (1) To rank the educational needs in their order of importance, (2) To develop alternative plans to meet those needs, (3) To determine budget allocation guidelines according to need priorities, (4) To monitor the benefit or value of a need as compared to its cost, i.e. to discover if fulfilling a need justifies its cost, (5) To develop a continuing, dynamic system to evaluate the college's effectiveness in meeting community needs.

PROCEDURES:

1. Build a basic Needs Assessment Model that would: (a) reflect change as to how each college's planning could best meet the community needs, (b) train college personnel in using the NAP Model, (c) allow preliminary application and refinement, (d) allow for feedback after completion, (e) and could be used by other colleges and educational systems.
2. Collect and coordinate the necessary community and college information to assess current and continuous needs.

3. Conduct specialized activities at each college to account for individual differences among participating colleges and their communities.

4. Make needs assessment an on-going administrative unit at each college in the consortium.

IMPLEMENTATION NEEDS:

The program coordinator or director of the project with the assistance of a secretary, researcher, and computer programmer manages and coordinates all phases of the activities. This staff contracts the following survey and planning organizations to perform specialized services: Florida State University's Systems and Planning Center, University of Florida's Institute of Higher Education, and the State Department of Education's Division of Community Colleges. These organizations effectively insure availability of professional expertise in the areas of management, economics, urban and regional planning, political science, behavioral or social science, educational planning, systems analysis, and programming.

During the developmental stages, programming, analysis, and collection of data required large amounts of money and time. Now that the model is completely developed, time, staff, and general costs to continue the Needs Assessment Project has been cut to less than one-fifth of the original development.

SPECIAL FEATURES:

1. An executive Consortium Board composed of the college president or his appointed top-level administrator operates for the purpose of general guidance and policy decision making to support the program coordinator.
2. The model is dynamic and spontaneous to the economic community since the data are updated monthly with the latest information on manpower needs.
3. The model is modular in that there are seven various forms of needs assessment models in addition to the central model. These forms are: (1) Goal-Setting Model, (2) Student Follow Up Model, (3) Student Characteristics Model, (4) Employer Assessment Model, (5) Faculty Evaluation Model, (6) Community Awareness Model, and (7) Management Analysis Model.

PRESENTED BY:

Katie D. Tucker, Florida State University, Tallahassee, Florida

NEEDS ASSESSMENT PACKAGE Florida State Department

DEVELOPER:	SOURCE:	COST:
Needs Assessment Development Project (NADP) Michael R. Knight Project Manager and Principal Developer	Room 4, Executive Building Florida Department of Education Tallahassee, Florida 32304 904/488-1365, 488-4488	Contact Developer
		COPYRIGHT: State of Florida

OVERVIEW:

The mission of the NADP is to develop, test, and produce a needs assessment package consisting of three primary products that have been designed to assist local school district personnel plan and conduct a comprehensive and systematic assessment of student needs as a basis for implementing systematic educational program planning and evaluation.

Two products of the NADP have been developed and have undergone some formative evaluation. Our product is Needs Assessment System: A Systematic Strategy for Conducting a Student-Oriented Needs Assessment. Using system analysis and system synthesis techniques, the Needs Assessment System delineates the function, subfunctions, tasks, and subtasks to be performed in the conduct of a comprehensive needs assessment in a systematic and logical manner. In addition, suggested alternative strategies for performing the tasks and subtasks are provided. The strategies consist of suggested methods, means, and resources (human and physical).

The second product is Introduction to a Needs Assessment System. The overall purposes of this training program is to (1) introduce the trainee to the Needs Assessment System; (2) give the trainee "experience" with the Needs Assessment System through controlled simulations and practical exercises; and (3) enable the trainee to begin applying the Needs Assessment System in his own work setting.

Introduction to a Needs Assessment System is designed to have maximum effect with a group of twenty-five trainees in a training session of from one to three days. Most of the material can be used with a group having as few as five members, and, an individual may complete the program as an independent study project.

Between January, 1976 - February, 1977, the two aforementioned products will undergo a controlled fieldtest in four local school districts. During this period a set of technical manuals will be developed and tested that are designed to provide detailed methodology for performing several tasks included in the Needs Assessment System. In addition, the third main product will be developed and tested during the fieldtest phase. This product will be a cadre of Department of Education, regional office, and university personnel who have been trained as trainers to assist local district personnel utilize the system and training program.

Needs Assessment Package

PROCEDURES:

The Needs Assessment System displays the subfunctions to be performed inorder to accomplish the first function of a six-step systematic planning model. The subfunctions are; (1) Identify Preferred Student Outcomes; (2) Determine Current Student Outcomes; (3) Identify Student Needs; and (4) Prioritize Student Needs. For each subfunction there are a series of tasks and subtasks to be performed, as well as alternative strategies and narrative descriptions of the strategies. The Needs Assessment System manual contains a full description of the steps to follow in the conduct of a needs assessment.

The Introduction to a Needs Assessment System includes a trainer's manual which lists the remaining materials in the training program, provides the intent or purpose of the materials, sets forth the procedures for using the materials, etc. The INAS is to be used with those persons assigned to conduct the needs assessment study prior to using the system.

IMPLEMENTATION NEEDS:

In order to use the system and training program, the local school district should have a needs assessment study director and needs assessment committee divided into task forces. The tasks and subtasks included in the system manual specify who is to do what. The manual also specifies other human and material resources necessary to perform the specified tasks and subtasks. The training program lists the material and equipment resources required to provide training to the system user group.

SPECIAL FEATURES:

Needs Assessment System:

1. Step-by-step approach to conducting a needs assessment.
2. Focuses on the identification of learner needs as the basis for program and support service planning.
3. Systematic and logical.

Introduction To A Needs Assessment System:

1. Designed to orient user to Needs Assessment System
2. Contains training manuals, practical exercises, review exercises, simulations, audio-tapes, transparencies, slide/tape presentations.

PRESENTED BY:

Michael Knight, Florida State Department of Education, Tallahassee, Florida

Jeff Pyatte, University of West Florida, Pensacola, Florida

INSTITUTIONAL GOALS INVENTORY

DEVELOPER:	SOURCE:	COST:
Educational Testing Service (R. Peterson, N. Uhl)	ETS College and University Programs Box 2813 Princeton, New Jersey 08540	Booklet/answer sheet .45 Scoring and Reporting $1.50 COPYRIGHT: 1972

OVERVIEW:

The Institutional Goals Inventory will aid in defining educational goals, establishing priorities among those goals, and giving direction to an institution's present and future planning. IGI should be especially useful to institutions in planning and evaluation. It is administered to all segments of the college community and the larger community in which the institution is situated.

IGI consists of 90 goal statements, each one answered on a five-point scale from "Of No Importance" to "Of Extremely High Importance" in reference to present goals (Is) and future goals (Should Be). Eighty of the statements are scored in 20 Goal Areas (see below); the remaining 10 miscellaneous goal statements are tabulated and reported individually. The Goal Areas cover both "outcome" goals and "process" goals. IGI is completely confidential and results are reported for groups, not for individuals. The fullest use of IGI will be possible when the responses from different groups within an institution (faculty, students, administration, for example) can be compared. The inventory is untimed but should take about 45 minutes to complete.

Each of the 20 goal areas listed below consists of four goal statements.

Outcome Goals: (a) Academic Development; (b) Intellectual Orientation; (c) Individual Personal Development; (d) Humanism/Altruism; (e) Cultural/Aesthetic Awareness; (f) Traditional Religiousness; (g) Vocational Preparation; (h) Advanced Training; (i) Research; (j) Meeting Local Needs; (k) Public Service; (l) Social Egalitarianism; (m) Social Criticism/Activism.

Support Goals: (a) Freedom; (b) Democratic Governance; (c) Community; (d) Intellectual Aesthetic Awareness; (e) Innovation; (f) Off-Campus Learning; (g) Accountability/ Efficiency.

1. Up to twenty additional Goal Statements and six additional information questions may be written locally, and the results will be tabulated and reported along with the other data.
2. Up to five subgroups are possible on one Report.

Costs for IGI are: Machine-scorable booklets (answer spaces are in each booklet) ..... $ .45 each
Scoring ..... $1.50 per booklet scored
There is a $200 minimum charge for scoring the booklets that appear in one Report.

Institutional Goals Inventory

PROCEDURES:

1. The institution orders IGI booklets/ answer sheets (at least four weeks prior to the administration date).
2. The institution selects a sample (any member of the college community can respond to IGI, e.g., faculty, students, administrators, alumni, and trustees), decides on subgroups, writes supplementary information questions and local option goal statements, prepares any additional instructions necessary for the administration of IGI, and distributes, collects, and returns completed IGI booklets/answer sheets to ETS for scoring and reporting.
3. Results are reported to the institution two to three weeks after receipt of the completed booklets by ETS. Three copies of the bound computer print-out IGI Summary Data Report are sent to the institution, and include:
   - Interpretive Guide
   - Information and Supplementary Information Questions
   - Twenty Goal Areas summarized for both Is and Should Be responses with means, standard deviations, and discrepancies
   - Goal Area Summaries rank ordered by Is means
   - Goal Area Summaries rank ordered by Should Be means
   - Goal Area Summaries rank ordered by discrepancies between Should Be and Is means
   - Ninety Goal Statements with Is and Should Be responses tabulated by percentage of responses to each alternative with mean, standard deviation, and discrepancies
4. Careful planning is essential to the success of goals study at any institution. A planning committee, with members from all campus constituencies, should be involved from the beginning in all phases of the planning.
5. A goals study is often part of more extensive planning activity at an institution, and it should be done early enough to be able to use the results in the larger planning process.
6. The administration of IGI should be supported by the president of the institution and should be given as much publicity as possible to encourage a good response.
7. Finally, the results should be distributed as widely as possible and used as the basis for continuing discussion of the institution's goals and planning.

IMPLEMENTATION NEEDS:

The administration of IGI can be done with available staff. The Office of Planning, the Office of Institutional Research, or some other office with staff experienced in collection and interpretation of data would be able to handle an IGI administration. The IGI Summary Data Report presents a great deal of data which should be summarized and analyzed by the Planning staff to ensure its fullest utilization on the campus.

SPECIAL FEATURES:

Subgroups - up to five subgroups, chosen by the institution, are possible on any IGI Report.

Local option goal statements - up to 20 additional goal statements may be written locally and responses will be tabulated and reported with the rest of the data.

IGI Publications:

R. Peterson: College Goals and the Challenge of Effectiveness
Crisis of Purpose: Definition and Uses of Institutional Goals
Toward Institutional Goal-Consciousness
Goals for California Higher Education: A Survey of 116 College Communities
($4.00)

SPECIAL FEATURES continued:

R. Peterson and N. Uhl: Comparative Data and Bibliography for IGI ($4.00)

PRESENTED BY:

Perkins Marquess, Brevard Community College, Melbourne, Florida

USING NATIONAL ASSESSMENT PROCEDURES AND MATERIALS FOR LOCAL PROGRAM EVALUATION

DEVELOPER:
Lincoln Public Schools, Nebraska

National Assessment of Educational Progress (NAEP)

SOURCE:
Eleanor Francke
Lincoln Public Schools
720 S. 22nd
Lincoln, NE
68501

Vern Achtermann
NAEP
1860 Lincoln
Suite 700
Denver, CO
80203

COST: See Publications List: Cost of reports ranging from $1.00 to $10.10

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NAEP Released Materials are in the Public Domain.

OVERVIEW:
The National Assessment of Educational Progress (NAEP) is an information-gathering project which surveys the educational attainments of 9-year-olds, 13-year-olds, 17-year-olds and adults (ages 26-35) in 10 learning areas: art, career and occupational development, citizenship, literature, mathematics, music, reading, science, social studies and writing. Different learning areas are assessed every year and all areas are periodically reassessed in order to measure the changes that occur in educational achievement over time.

The NAEP project uses objectives-referenced test instruments in assessing the knowledge, skills, understandings and attitudes of the four target age populations. Students are assessed in small group sessions using a paced (timed) tape recording, as well as individual sessions (one-to-one interview mode). The exercises (test items) vary in degrees of difficulty, thus enabling one to describe a broad range of educational attainments. Assessment data are reported for the nation, regions of the country, sex, race, size and type of community and level of parental education.

After each assessment year, NAEP releases about half of the exercises. These materials are in the public domain and are available to secondary users to review, adopt or adapt, and use in state-district-local assessment programs. NAEP is not in the commercial test publishing business and does not have off-the-shelf prepackaged test instruments. The objectives, exercises, methods and procedures plus data results for each exercise are documented in various reports and monographs. These "pools" of objectives and exercises are available to interested users who want to custom-build their own assessment programs.

PROCEDURES:
This presentation tells "The Lincoln Story -- Using National Assessment Procedures and Materials for Local Program Evaluation".

Three basic questions are explored:

1. Why did Lincoln Public Schools use NAEP procedures and materials?
2. How did Lincoln Public Schools use NAEP procedures and materials?
3. What impact has the assessment had on the educational decision-making process at Lincoln Public Schools?

USING NATIONAL ASSESSMENT PROCEDURES AND MATERIALS FOR LOCAL PROGRAM EVALUATION

NAEP

The major emphasis of the presentation focuses on the procedures that were used by a local district to evaluate student writing performance, and in retrospect, the strengths and weaknesses of the Lincoln approach.

IMPLEMENTATION NEEDS:

The NAEP model and materials are designed to measure educational achievement for the nation and to monitor and report the changes that occur over time. This is NAEP's primary mission. However, one of the by-products of this assessment effort is the release of objectives, exercises, data results and assessment technology to interested secondary users. There are no set "rules of the game" as to how secondary users must use these available resources. There are, however, certain procedures that should be followed if secondary users plan to make reasonably valid comparisons of their data to the NAEP data.

The degrees of rigidity and flexibility in using NAEP resources is determined by the secondary users who must ask the basic question -- "What kind of information am I looking for and what am I going to do with it once I have it" -- prior to launching a full-scale assessment program.

SPECIAL FEATURES:

NAEP released:

a) Assessment procedures
b) Objectives for 10 learning areas
c) Exercises (pool of 1,000+)
d) Data for each exercise

PRESENTED BY:

Eleanor Francke, Lincoln Public Schools, Lincoln, Nebraska

Vern Achtermann, National Assessment of Educational Progress, Denver, Colorado

THE "OUR SCHOOLS" PROJECT ON New Jersey

NEEDS ASSESSMENT

DEVELOPER:	SOURCE:	COST:
New Jersey State Department of Education, with the assistance of -- Educational Testing Service, Princeton Opinion Research Corporation, Princeton	New Jersey State Department of Education 225 West State Street Trenton, New Jersey 08638	COPYRIGHT:

OVERVIEW:

The major objective of the "Our Schools" Project was to develop and recommend to the New Jersey State Department of Education and the New Jersey State Board of Education, a set of state-wide educational goals established through a program of broad-based citizen involvement.

Through a series of state-wide, regional, and local conferences, a public opinion survey and a public information/media campaign, a broad discussion about public education in the State by citizens of New Jersey was initiated and facilitated. The discussion was structured so that public input could be obtained relative to recommendations concerning goals, process and product oriented; objectives; priorities; and needed programs, innovations or changes in New Jersey public schools and considering both the present and the future time dimensions.

The "Our Schools" Project has produced the following products and processes: (A) Two sets of educational goals for New Jersey, (one, outcome, and the other, process) adopted by the State Board of Education in 1972. (B) A set of reports on conferences, meetings, surveys, and letters from the public. (C) A structure for mounting and conducting such a project, utilizing a State Advisory Council, a cadre of staff in the Department, outside consultants, support of organization and agencies. (The Governor's Office, the N. J. Schools Board Association, the N. J. Bankers Association.) (D) (D) Specific designs for state-wide, regional and local meetings involving substantial public participation. (E) A "do-it-yourself" kit applicable at the local level for citizens and school people who wish to organize and conduct an "Our Schools" program for themselves. (F) (Indirectly influenced) A series of Planning Handbooks for local school districts, one of which is based largely on the experience of this Project and pertains to local goal determination for schools. (These are available at cost from the N. J. State Department of Education.)

PROCEDURES:

1. Creation and appointment of a State Needs Assessment Advisory Council, consisting of lay representation, students, and delegates from major organizations concerned with education and the schools.
2. Conduct of two state-wide conferences, one at the beginning and one at its conclusion.
3. Conduct eighteen regional conferences (covering 21 countries) utilizing local/lay leadership.
4. Conduct local conferences at district, school or neighborhood levels (optional, at local initiative).
5. A state-wide public opinion poll involving a statistical sample of citizens,

educators and students.

6. Design and launch a statewide public media campaign (brochures; newspaper articles; notices and editorials; television "clips"; radio announcements, conference exhibits and presentations; literature and display boards at post offices and banks; billboard ads; letter and telephone solicitation and response provisions).
7. Special surveys and meetings for pertinent key groups requesting these, e.g., students, local district school boards.
8. Data compilation and analysis of results.
9. Recommendations to the State Board of Education:
   - Adoption of State-wide Goals
   - Establish a follow-through plan (Phase II)
   - Establish a cyclical pattern for the overall process
   - Continue State Department of Education involvement, utilization, and development with respect to materials
   - Dissemination of results.

IMPLEMENTATION NEEDS:

Time. Design time will require two to three months. Implementation time will range from twelve to fifteen months. Dissemination time and preparation for the next phase will require about three months. A large segment of time is involved in each of these stages for setting up a series of meetings for the public across the state, for informing, preparing and inviting them, and in scheduling these meetings so that they contribute sequestially to the overall process and outcomes.

Staff and Personnel (minimal). A professional coordinator or director, at least half-time, who is both adept in planning techniques and responsive to citizen involvement; a research aide or assistant, full-time; and a secretary.

Costs for program components. Costs of publishing materials for distribution, reports and guides; costs of consultants or staff for preparation and conduct of surveys and data collection, analysis and interpretation; costs for conferences and meetings, such as for travel, snacks and facilities. (Through grants from and support of various organizations and groups many of these costs can be partially or wholly absorbed by others.)

SPECIAL FEATURES:

The "Our Schools" Project was designed:

...as a State-wide program
...to promote and facilitate broad citizen discussion about public education in the state
...to establish educational goals, priorities and program directions for the State
...to permit citizen response and input to the process before and while it was underway, as well as to the substance of the deliberations
...to be cyclical
...to permit follow-through ("Phase II")
...to permit (optional) application of the process at the local level
...to allow focus on educational needs both for the present and in the future (over a ten-year span)

PRESENTED BY:

Dr. Bernard A. Kaplan
Educational Policy Research Center, Syracuse University Research Corporation, Syracuse New York

Formerly director of "Our Schools" Project and Deputy Assistant Commissioner, Division of Research, Planning and Evaluation
New Jersey State Department of Education

FUTURING MATERIALS AS APPLIED TO EDUCATIONAL LONG-RANGE PLANNING

DEVELOPER:

Tom McCollough, et al.

SOURCE:

Project Redesign
Palo Alto Unified School District
25 Churchill Avenue
Palo Alto, California 94306

COST:

None

COPYRIGHT:

None

OVERVIEW:

During the course of a comprehensive long-range participatory planning project, a task force of students, parents, and professional staff developed a set of futuring materials for use by other project planners. These materials were used as orientation materials, and in a prologue to the working draft of the five-year plan recently presented. Three alternative futures are explored:

Status Quo Extended

Cultural Transformation

Economic Disappointment

During the presentation, these scenarios will be briefly discussed. The major portion of the presentation will deal with the implication these futures might have for education, and what practical impact (or lack of it) this work has had on the District as a whole.

PROCEDURES:

A heterogeneous group of citizens, students, and professional staff combed the futures literature. After synthesizing some major themes, they created a list of five or six usable presentations as orientation for our long-range planning project. This entire experience has been recorded and published and is available free of charge. Write for:

A FUTURES PRIMER FOR LOCAL EDUCATION AGENCIES

c/o Project Simu-School
Office of the Superintendent of Schools
Santa Clara County
100 Skyport Drive
San Jose, California 95110

IMPLEMENTATION NEEDS:

Palo Alto is fortunate to have a number of noted futurists as parents who were helpful in the development of the futures materials. Much of the groundwork has been done for others who would like to develop materials of their own, or use the materials we have developed. We suggest that school districts undertaking the application of futures materials in their planning operation locate someone in their local setting who is familiar with the literature.

SPECIAL FEATURES:

PRESENTED BY:

Tom McCollough, Palo Alto Unified School District, Palo Alto, California

A VARIETY OF NEEDS ASSESSMENT INSTRUMENTS CREATED BY A PARTICIPATORY PLANNING PROJECT IN PALO ALTO, CALIFORNIA

DEVELOPER:

Rudolph Johnson,
Tom McCollough, et al.

SOURCE:

Project Redesign
Palo Alto Unified School District
25 Churchill Avenue
Palo Alto, California 94306

COST:

None

COPYRIGHT:

None

OVERVIEW:

Since July, 1972, the Palo Alto Unified School District has been engaged in a comprehensive long-range planning project. In the process, many survey instruments have been created and used to gather information about the school system from all of the client groups: citizens, students, teachers, administrators, and classified staff. The survey instruments to be displayed and discussed at the session include:

Needs Assessment (General)
Administrative Needs Survey
Student-Teacher Relationships
Elementary Environment Alternatives
Budget Priorities

The focus of the presentation will be on the construction and conduct of surveys using participatory means, as well as the pitfalls we encountered in the process. Copies of the instruments will be available for participants.

PROCEDURES:

Each of the surveys to be discussed was created by heterogeneous groups of professional staff, citizens, and secondary students who volunteered their time in performing the task. Following participatory procedures requires an understanding of the unusual role of the primary professional investigator, who must be part technician, part group facilitator, part consultant, and part educational theorist. Time is extended compared with survey procedures completed by survey technicians. Some work, such

as writing the computer program for tallying and analyzing results, can be done by professionals, but under the watchful eye of the volunteer planning team. Sampling procedures will be discussed.

IMPLEMENTATION NEEDS:

Surveying opinions or developing needs assessments can be accomplished by school districts or local schools using voluntary participatory techniques, if a commitment is made to support the effort with human resources, and if rapid turn-around time is not required. Costs will vary with the scale of the survey and size of sample.

SPECIAL FEATURES:

None

PRESENTED BY:

Tom McCollough, Palo Alto
Unified School District,
Palo Alto, California

PHI DELTA KAPPA'S "EDUCATIONAL GOALS AND OBJECTIVES

A MODEL FOR COMMUNITY AND PROFESSIONAL INVOLVEMENT"

DEVELOPER:	SOURCE:	COST: Sample Kit $3.00 Community Kit $60.00 Replacement Kit $28.00
Phi Delta Kappa	Phi Delta Kappa Commission on Educational Planning Post Office Box 789 Bloomington, Indiana 47401	COPYRIGHT: 1972

OVERVIEW:

Designed to produce a set of goals and objectives for a school or a school district, the Phi Delta Kappa (PDK) Model provides a complete kit with detailed, step-by-step instructions for organizing the program and what one does as a participant. A representative community committee is selected with membership consisting of citizens-at-large, school staff, and students. Four ways of selecting the committee are proposed, and the advantages and disadvantages of each method are listed. Goals are established from a prepared list of eighteen (18) general statements by either a committee or a group of small committees, and they are prioritized. The same people give their perceptions of how well the schools are doing currently in meeting those goals.

The information is given to professional staff members who then prepare objectives for their programs. Unlike the goal-setting procedures which are very specific, the instructions for the development of objectives are very general. The content and scope of the training, for example, is left open-ended as is the set of steps for converting curriculum into objectives. Those who desire specific instructions can complement this section with other materials. Still others may opt to prepare objectives directly from goals rather than preparing objectives from existing content. This approach, however, requires complementing PDK materials with other materials.

Another committee then matches the program objectives to the goals and determines whether or not anything else needs to be done to complete the goal and objective-setting process.

Phi Delta Kappa recommends that the next step consist of designing and conducting educational programs in concert with scund management techniques. Of course, those who believe that assessment should involve more than the perceptions of the committee can opt to complement these materials with a more formalized assessment plan prior to the designing and conducting of programs to address the goals and objectives.

PROCEDURES:

1. Administrative staff selects strategies for the composition of the Community Steering Committee.
2. Eighteen prepared goal statements are distributed to each member of the Committee along with explanatory materials.
3. Committee members rank goals individually using a printed display board and movable tabs.

4. Small groups then rank goals.
5. Total Steering Committee consensus is calculated mathematically on the basis of number weights assigned to goals.
6. Total Committee agrees on final ranking of goals.
7. Goals are analyzed by individual members, small groups and total Committee in terms of how well the district or school is addressing those goals.
8. Goal analysis findings are then approved by total Committee and turned over to the professional staff for resolution.

IMPLEMENTATION NEEDS:

A project director (an educator) with some clerical assistance is required. It is estimated that the goal-setting phase of the program can take place over a twelve-week span of time; the phase concerned with developing objectives can take from two to six months beyond initial training activities. Time commitment, however, will vary and depends upon local conditions.

The total cost of materials is under $100 and other costs (e.g. refreshments, etc.) are minimal.

SPECIAL FEATURES:

The PDK Goal Setting Kit features:

... a complete training kit, including instructions, sample materials, guidelines, etc.
... alternative selection procedures to select participants and advantages and disadvantages of each.
... a well-planned, field-tested model.
... a minimal cost.
... available in Spanish and English; ninth-grade reading level.

PRESENTED BY:

William Phillis, Columbiana County Office of Education, Lisbon, Ohio

QUALITY EDUCATION PROGRAM STUDY (QEPS)
(An ESEA Title III Project)

DEVELOPER:	SOURCE:	COST:
Pennsylvania Department of Education and Bucks County Intermediate Unit #22, Division of Curriculum and Instruction, Bucks County, Pennsylvania	Office of the Executive Director Bucks County Intermediate Unit Ansley Building Old Easton Road Doylestown, Pennsylvania 18901	Contact Source COPYRIGHT: None

OVERVIEW:

The material contained in the 20 paperback QEPS booklets is an effort to define and clarify the Ten Goals of Quality Education adopted by the Pennsylvania State Board of Education in 1965. There are three project reports as follows:

A - Project Description
B - General Needs Assessment
C - Characteristics of Incidents and Their Reporters

For each of the Ten Goals, two booklets have been written. The first is a Description of the goals and contains specific indicators related to the following components:

1. The categories of student behavior.
2. Rationales of effective student behavior.
3. Related teacher strategies.

The second booklet is related to Needs Assessment of the goal and contains:

1. Instructions.
2. General needs assessment instruments.
3. An analysis of instruments related to that goal.

Thus, there are two booklets for each of the Ten Goals. The areas covered by each of the goals are as follows: Self-understanding, Understanding Others, Basic Skills, Interest in School and Learning, Good Citizenship, Good Health Habits, Creativity, Vocational Development, Understanding Human Accomplishment, Preparing for World Change.

PROCEDURES:

The critical incident technique developed by Dr. John C. Flanagan at the University of Pittsburgh was adapted for use in collecting data. Teachers, parents, and students were asked to report observed student behaviors which clearly indicated the attainment of each of the Ten Goals for Pennsylvania. Population samples participating in the study were selected from the large school systems of Pittsburgh and Philadelphia, suburban schools, and rural school systems in Pennsylvania. Specific reporters collected the data, transcribed it onto coded cards in the QEPS office, it was reviewed by QEPS staff, and forwarded to the American Institutes of Research (AIR) for analysis and developing a classification scheme inductively. In this way, approximately 20,000

critical incidents were collected and categorized in an effort to further clarify the Ten Goals of Quality Education for Pennsylvania. Reliability was established by determining the degree of agreement between AIR and thirty raters from the Pennsylvania Department of Education.

The same procedure was followed for determining effective teacher strategies for each of the Ten Goals. This was followed by the development of a general and individual needs assessment instrument for each goal. And finally, commercial instruments were examined and classified in terms of which goals they measured.

IMPLEMENTATION NEEDS:

Implementation needs would depend on whether the object was to duplicate the study or use it as the basis for conducting needs assessments for the purpose of making curricular revisions. For implementing the needs assessment instruments, the behaviors could be reproduced on 3 x 5 cards and response sheet developed. Target groups and sample sizes would also have to be established. The cost of collecting the data and analyzing the results would depend entirely upon the size of the project and the means available for doing the job.

There appears to be little need to duplicate the project at this time in view of the data that has been generated by private and public educational agencies since 1970.

SPECIAL FEATURES:

1. The Project was a pioneering step in developing the state-wide quality assessment program in Pennsylvania.
2. The QEPS instruments have been widely used throughout the world in conducting needs assessments.
3. The QEPS instruments have also been used in program development and long range planning models.

PRESENTED BY:

Ed Garlitz, Bucks County Public Schools, Doylestown, Pennsylvania

SAN DIEGO COMMUNITY COLLEGE DISTRICT-WIDE

NEEDS ASSESSMENT MODEL

DEVELOPER:	SOURCE:	COST:
San Diego Community College District Office of Planning and Evaluation Services	Same	COPYRIGHT: None

OVERVIEW:

Designed as a scientific management tool to provide data upon which educational program planning and management decisions can be made at the community college level. The model provides a basis for determining priorities and provides for public accountability.

The comprehensive, five-phased Needs Assessment model brings together the collective input from every partner in the educational process--the community, community leaders, the students (both former and current), and the community college staff (faculty, administration, and support personnel). By the use of comparative analysis and various reconciliation strategies, the user of this model is better able to develop programs, facilities, and services which are consistent with the needs of those it serves.

PROCEDURES:

Identification of groups to be surveyed:

Formulation of needs assessment questions through input from selected members of the community college student body, staff, and district residents.

Distribution of questionnaires based upon random sampling techniques. (Including pre-test of questionnaires for possible modifications.)

San Diego Community College Districtwide Needs Assessment Model

Collection of data:

Data, once collected, is computer programmed to allow for data analysis.

Gaps which may exist between current outcomes and achievements and (or desired) outcomes and achievements are determined and prioritized.

Final report is written and presented to Board of Trustees, general community, staff, etc.

IMPLEMENTATION NEEDS:

Small staff of field interviewers with limited clerical assistance. Some computer capacity is required for in-depth analysis of data. Most community colleges could implement this model.

Costs would therefore be minimal.

SPECIAL FEATURES:

The model includes complete questionnaires for all participants in the Needs Assessment Survey; step by step procedures used in the development of the questionnaires used; tabular presentation of all data for easy analysis.

PRESENTED BY:

Larry Morgan, San Diego Community College, San Diego, California

SOUTH CAROLINA

NEEDS ASSESSMENT MODEL

DEVELOPER:

Office of Planning
and Evaluation
South Carolina Department
of Education
Diana J. Ashworth, Director

SOURCE:

Office of Planning
South Carolina Department
of Education
608 Rutledge Building
Columbia, South Carolina
29210

COST:

No Cost

COPYRIGHT:

None

OVERVIEW:

Designed especially for identifying needs to assist board members and top management personnel in making decisions at the state level, the South Carolina Needs Assessment Model is a research-oriented instrument including a series of components which lead to the identification of both learner and system needs through perceptual and empirical data. The major steps in the model are as follows:

1. selection of information sources and tests for measuring descrepancies;
2. collection of data for each component;
3. preliminary identification of needs through discrepancy measurement and matching;
4. final identification and approval of needs; and
5. adoption of objectives and development of long-range plans.

PROCEDURES:

1. Determine potential need areas by examining national indicators and state context indicators.
2. Determine perceived needs by conducting surveys of public, professional, and student opinion.
3. Examine input and output indicators to determine system needs.

4. Reexamine all data components to arrive at a synthesis of needs.
5. Prepare final decision-making document identifying needs for state board.
6. Develop major objectives based on approved needs.

IMPLEMENTATION NEEDS:

1. Access to extensive information sources.
2. Adequate time frame (approximately nine months).
3. Competent research staff of 4 - 6 persons.
4. Adequate financial resources for privately contracted opinion surveys.

SPECIAL FEATURES:

1. Adaptable to district level operations.
2. Comprehensive--examines both system and learner needs.
3. Oriented toward policy levels of decision-making.

PRESENTED BY:

Alton Loftis, South Carolina State Department of Education, Columbia, South Carolina

COOPERATIVE REGIONAL COMPREHENSIVE NEED APPRAISAL

DEVELOPER:	SOURCE:	COST:
University of Illinois	University of Illinois 377 Administration Building Urbana, Illinois 61801	COPYRIGHT:

OVERVIEW:

The University of Illinois' Cooperative Regional Comprehensive Need Appraisal project was undertaken in cooperation with four comprehensive community colleges in nine northwest counties of the State of Illinois.

The purpose of the project was to determine (1) what educational needs exist in the region and (2) whether significant differences in educational needs exist between the "general" population and University of Illinois alumni living in the region. Nearly 2700 citizens and alumni were contacted via telephone by University trained interviewers. Through a 51-question questionnaire, data was collected on educational interests and needs related to college level and secondary school credit and non-credit continuing education programs.

PROCEDURES:

Following receipt of commitment to the project by the President of each participating institution, a Regional Consultative Council (RCC) was established. In turn, this Council formed a Task Force to (1) develop a strategy for the project, (2) develop a questionnaire and (3) provide appropriate training to interviewers.

Telephone interviewing was the technique chosen to collect data from the sample of nearly 2700. The sample consisted of more than 500 households for each of the four community colleges and nearly 600 names of University of Illinois alumni. A two

month period was allotted for the collection of data with three additional months provided for data reduction and report filing.

IMPLEMENTATION NEEDS:

Currently in process.

SPECIAL FEATURES:

- Two-phase project: (1) data collection and (2)data interpretation and program implementation
- Cooperative project with community colleges and the University of Illinois
- Comprehensive educational need appraisal for persons of all educational levels and interests.
- Funded through institutional reallocation of funds no outside funding in Phase I.

PRESENTED BY:

Robert Bender, University of Illinois, Urbana, Illinois

Jon Irby, University of Illinois, Urbana, Illinois

WESTINGHOUSE LEARNING CORPORATION: EDUCATIONAL NEEDS ASSESSMENT

DEVELOPER:	SOURCE:	COST:
Westinghouse Learning Corp. Educational Consulting Staff	Westinghouse Learning Corp. P. O. Box 30 Iowa City, Iowa 52240	Pre-printed booklets 22¢ each, processing $300 + 50¢/participant COPYRIGHT: 1973

OVERVIEW:

The Educational Needs Assessment system is designed to collect and rank information obtained from educators, students, and community members concerning 50 goals common to school districts. A pre-printed document listing the goals is available for distribution to the selected participants. Each participant is asked to respond to each goal statement in terms of how important the goal is deemed to be, whether attainment of the goal is the responsibility of the school district, and whether the goal is already being attained. The reporting service ranks each of the goals in terms of importance, responsibility, and attainment by respondent group. A Q value is also reported which is determined by the formula I (importance) x R (responsibility)/A (attainment). The Q value given for each goal statement identifies those goals which are the responsibility of the school and ranked important by the respondents - but perceived by the respondents as not being attained by the school. The Q value allows district administrators to obtain yet another indicator in the interpretative process if prioritizing the goals requiring immediate implementive action. An option is offered to school districts to print their own goal statements in the booklets and still take advantage of receiving the 8 different ranked reports. (Associated printing costs for the "customized goal booklet" is added to the cost figure quoted.)

PROCEDURES:

1. School district personnel decide the number of respondents from each group (educator, community, student) to be sampled.
2. Goal booklets are ordered, disseminated, and returned to the scoring center for processing.
3. Eight sets of ranked reports are supplied to school district personnel for analysis and review.
4. Goals which require immediate implementation are prioritized by school district personnel.
5. Results of the assessment and determined district action is communicated to the various respondent groups by district administrative personnel.

Westinghouse Learning Corporation: Educational Needs Assessment

IMPLEMENTATION NEEDS:

Sampling procedures must be determined prior to ordering and dissemination of goal booklets. A guide suggesting sampling procedures is provided with the goal booklet. The ordering and dissemination is best conducted by an assessment coordinator with secretarial support to determine calendar time lines. Administration of goal booklets can be conducted via mail, or in group or class meetings with the assessment coordinator establishing policies and procedures. Report interpretation and implementation can be accomplished using district administrative staff members as well as representatives of each respondent group included in the "panel."

SPECIAL FEATURES:

The optional "customized" goal booklet offers wide flexibility to schools wishing to gather specific information about their unique needs. A questionable section printed on the back of the goal booklet lists questions asked by Phi Delta Kappan in their annual education survey. Supportative Educational Consulting Service, provided on a bid basis, allows maximum efficiency in goal prioritization, communication modes to respondent feed-back, as well as implementation directions and action.

PRESENTED BY:

William Burgess, Haskell Indian Jr. College, Lawrence, Kansas

WORLDWIDE EDUCATION AND RESEARCH INSTITUTE MODEL

DEVELOPER:

Geraldine H. Plumb, Ed.D.
Coordinator, Federal Programs
Boise Schools

SOURCE:

World Wide Education and
Research Institute
Dr. Jefferson N. Eastmond,
President
2315 Strigham Ave.
Salt Lake City, Utan

COST: A Title I Incentive Grant $9,630 - includes cost of all surveys

COPYRIGHT:

1972

OVERVIEW: Designed by Jeff Eastmond and Geraldine Plumb to especially fit the needs of the Boise schools for a comprehensive needs assessment. The needs assessment addressed itself, not only to identifying the most critical learner needs, but also to providing a rational and systematic procedure for identifying and documenting them in such a way that they were not repeatedly challenged. The assessment was undertaken with the express purpose of providing ways to improve the educational program for the boys and girls of Boise, and to serve as a basis for long range planning. A Quality Assurance committee was appointed by the Administration to monitor the study.

The critical needs were identified in conformance with criteria developed by the U.S.O.E. in 1970 and were categorized in terms of their priority (or criticality). Task force committees consisting of 15 persons, broadly representative of the community, were selected by the Quality Assurance Committee in the areas of preschool, elementary, Junior High, High School, and Post-High School education to participate in a 3 day Concerns Analysis Conference. Major areas of concern identified were: 1) Public understanding of school matters and school problems, 2) Adequate vocational and occupational training, 3) need for children to develop positive self-images and, 4) need for children to do critical thinking and problem solving. Each validated need exhibited these characteristics:

1. The focus was on learner needs - not institutional needs
2. The target group of learners were identified
3. A criterion for judging the eventual satisfaction of need was developed.
4. The criticality of each need was developed
5. A target date was set for the satisfaction of each need

PROCEDURES:

1. Appoint quality assurance committee
2. Orient quality assurance committee
3. Review goal statements for adequacy
4. Develop schedule of activities
5. Conduct survey of opinions (teachers, students, administrators, public, etc.)
6. Gather and summarize baseline data on student achievement
7. Carry out concerns conference
8. Classify concerns
9. Appoint needs assessment committees--one for each school level to conduct concerns analysis.

WORLDWIDE EDUCATION AND RESEARCH INSTITUTE MODEL

PROCEDURES: (cont'd)

10. Document concerns with facts and policies
11. Conduct concerns analysis
12. Publish statements of critical need
13. Outline steps for resolving critical needs

IMPLEMENTATION NEEDS:

Due to the comprehensive nature of this type of needs assessment a data bank of pupil achievement should be readily available. Ample time should be allowed to do the five different surveys (Procedures 6.0 - 10.0). Computer assistance is necessary to tabulate the 100 question survey for 2,000 persons.

The uniqueness of the public poll gave us a much higher return than usual methods. Each sixth grade teacher in the district selected 2 boys and 2 girls to take two questionnaires. Each boy asked his father and a male neighbor, with no children in the school to fill out the questionnaire. Each girl asked her mother and a female neighbor, with no children in the school, to fill out the questionnaire. Students were responsible for collecting and returning them to school.

A three day district Concerns Analysis Conference was held to document concerns and develop the learner needs along with dates established to resolve needs. Results were documented in a set of five booklets: Analysis of Educational Concerns, Critical Educational Needs, Recommended Action, Working Papers for An Operational Philosophy, and Intermediate Goals and Objectives.

SPECIAL FEATURES:

This model integrates tests and other objective data with public opinion polls and a concerns analysis. The latter assists participants to arrive at priorities of need by combining facts, values, and policies. Concerns can be documented in such a way as to produce a set of validated needs.

Seven extremely critical needs were identified, and all but one were learner-directed. The seventh, "creating mutual trust between parents, teachers, and administrators," reflected the unusual turmoil of that school year in Boise.

PRESENTED BY:

Geraldine Plumb, Independent School District, Boise, Idaho

John Briggs, Idaho State Department of Education, Boise, Idaho